

Unlocking a bioeconomy across Europe: How to scale up national strategies, build skills and fuel investments ?



6 July 2022

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EU Bioeconomy Strategy Progress Report

European Bioeconomy policy: stocktaking and future developments

Peter Wehrheim, HoU for Bioeconomy and Food System, DG Research and Innovation

Unlocking a bioeconomy across Europe –

How to scale up national strategies, build skills and fuel investments

6th July 2022, CEFIC, virtual event

A decade of policy

2012

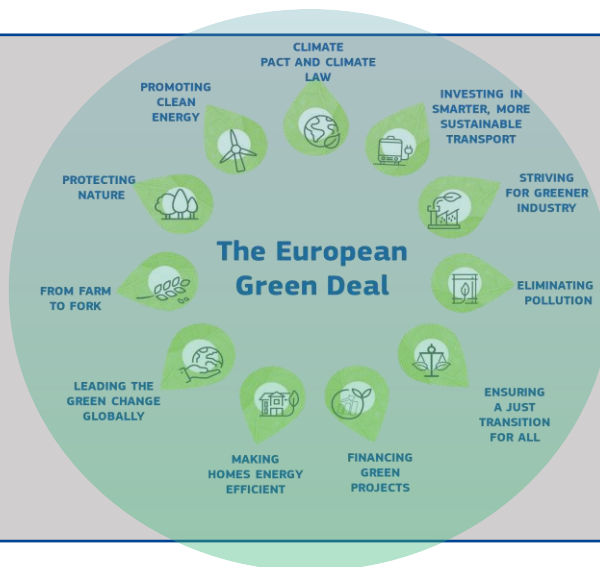


First Bioeconomy Strategy

2018



Updated Bioeconomy Strategy



Towards a green and just transition

2019



Council Conclusion

2022



Bioeconomy Progress Report

Objectives of the Progress Report

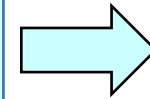
1. Reporting on the progress of the implementation of the 2018 EU Bioeconomy Strategy, as well as the general progress of the bioeconomy in Europe.

2. Framing the bioeconomy within the new policy context, e.g. the European Green Deal.

EU Bioeconomy Progress Report

- Executive Summary

1. Introduction
2. What is bioeconomy?
3. General trends in the development of the bioeconomy in Europe
4. EU Bioeconomy Strategy objectives in the context of the European Green Deal
5. Progress of bioeconomy activities under the EU Bioeconomy Strategy Action Plan
6. Unlocking the opportunities of the bioeconomy



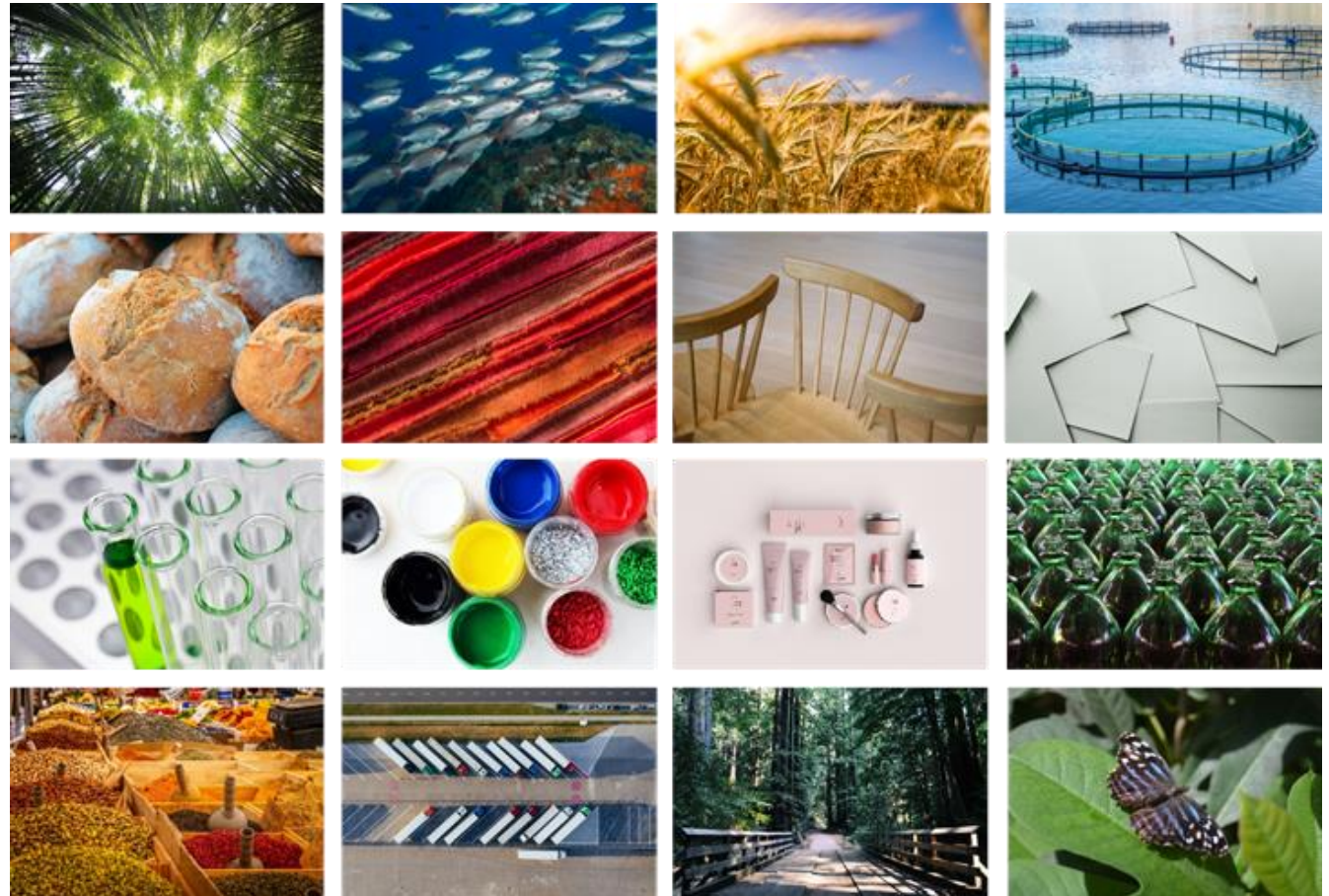
**Background,
concept
and definition**

What is bioeconomy?

EU definition

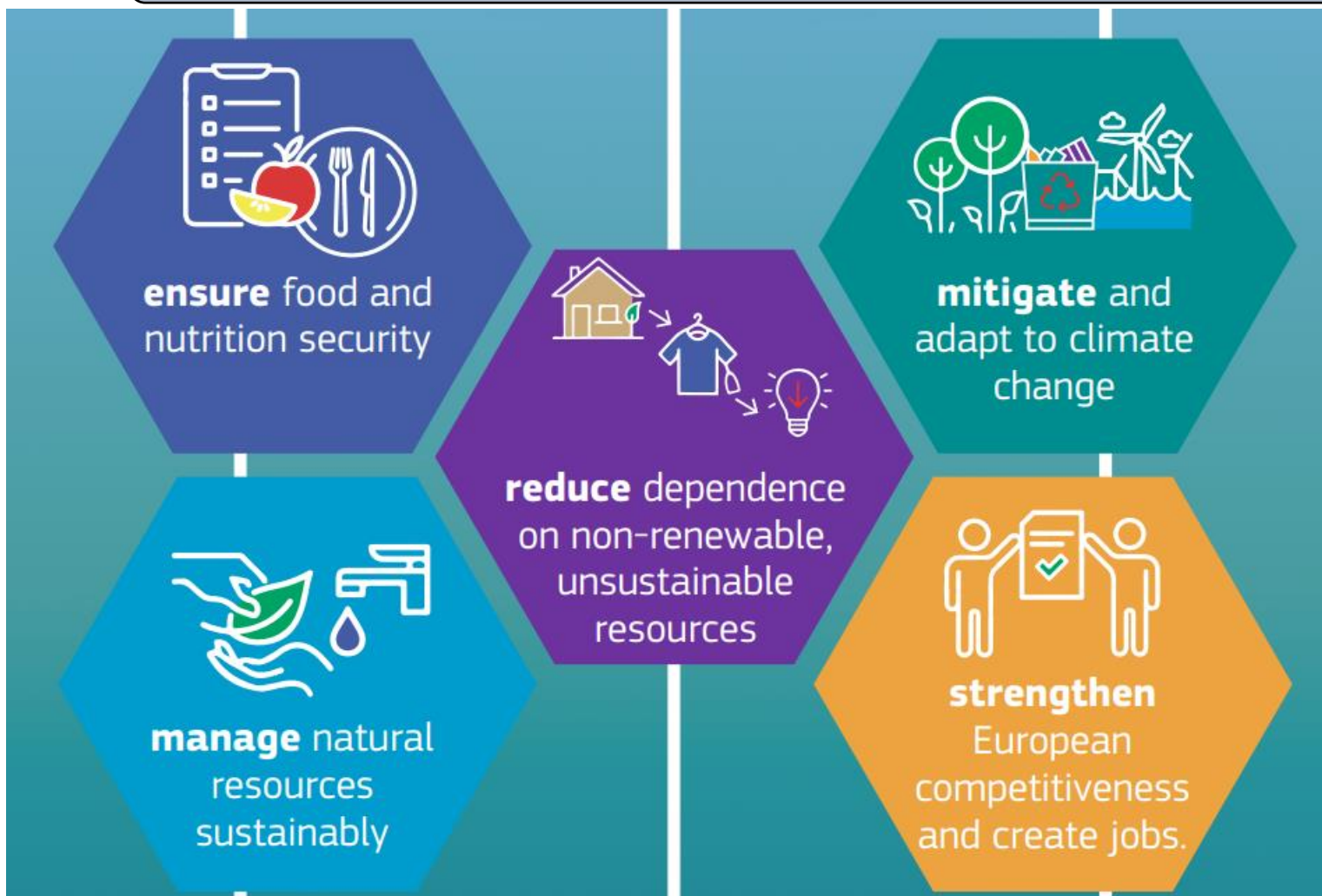
Bioeconomy encompasses all sectors and associated services and investments that produce, use, process, distribute or consume biological resources, including ecosystem services.

As such it is a natural enabler and result of the European Green Deal transformation.



Why do we need the bioeconomy?

Objectives of the 2018 EU bioeconomy policy

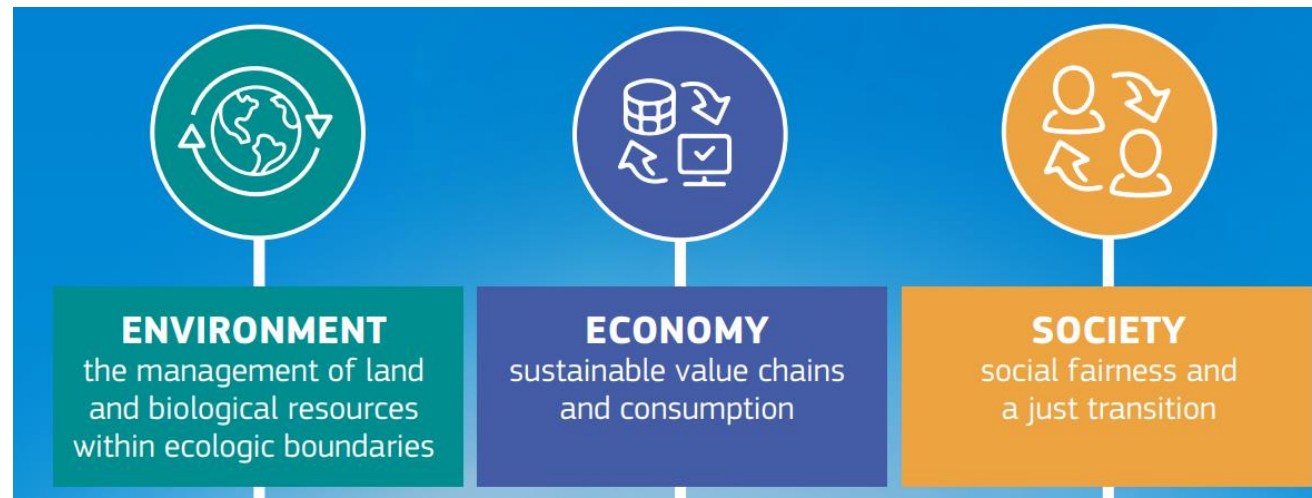


What is bioeconomy policy?

EU bioeconomy policy

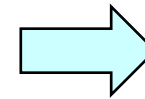
Bioeconomy policies take a **cross-sectoral perspective** to improve policy coherence and **identify and resolve trade-offs**.

Bioeconomy policies contribute to build a bioeconomy addressing all **three dimensions of sustainability**:



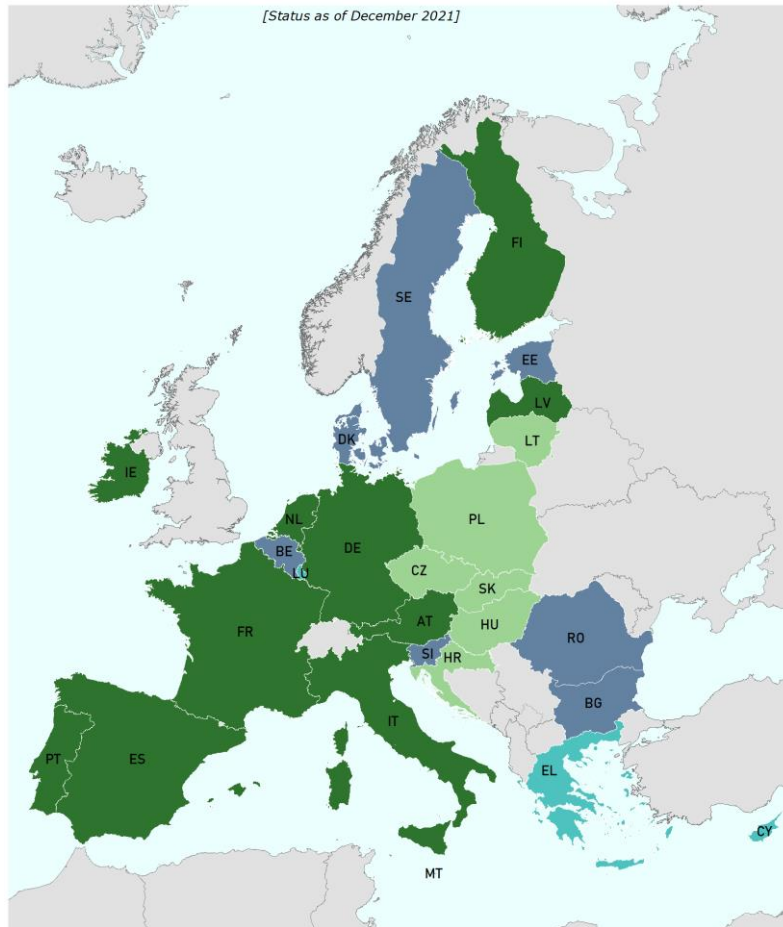
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- Development of national and regional bioeconomy strategies
- Development of biomass supply and use until 2017
- Overview of economic figures
- Support for the biobased industries

National bioeconomy strategies are becoming more numerous throughout Europe



Status of national bioeconomy strategies:

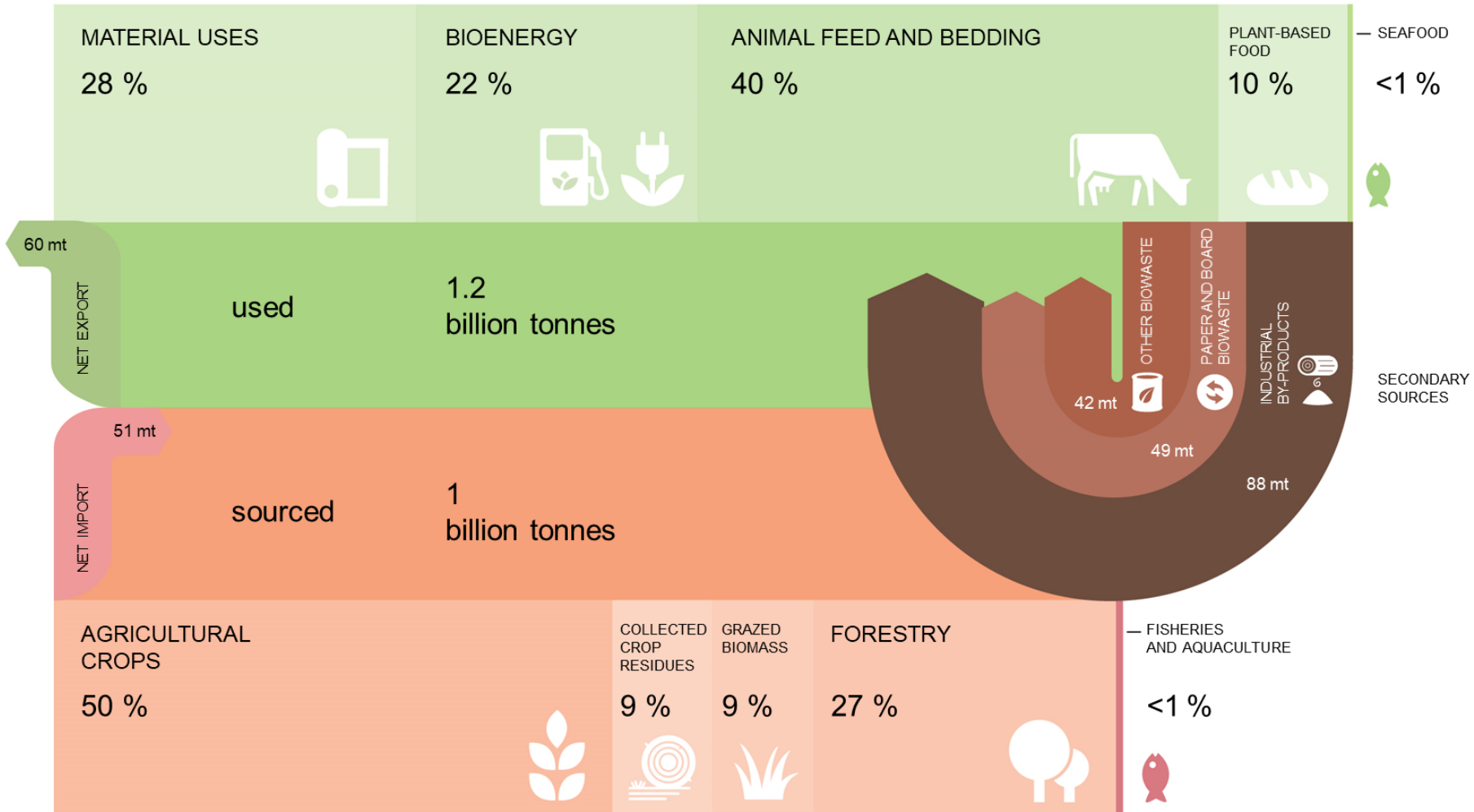
- Dedicated bioeconomy strategy at national level
- Dedicated bioeconomy strategy at national level under development
- Other policy initiatives dedicated to the bioeconomy
- Other related strategies at national level

Source: EC's Knowledge centre for Bioeconomy
Administrative Boundaries:
© EuroGeographics © UN-FAO © Turkstat

Status of the national bioeconomy policies in the EU-27

- 10 Member states with dedicated bioeconomy strategies at national level (AT, DE, ES, FI, FR, IE, IT, LV, NL, PT)
- 6 MS in the process of developing their respective dedicated national strategies (CZ, HR, HU, LT, PL, SK)
- 7 MS are involved in other macro-regional (BG, DK, EE, RO, SI, SE) or sub-national (BE) policy initiatives dedicated to the bioeconomy.
- 4 MS have bioeconomy related strategies (CY, EL, LU, MT)

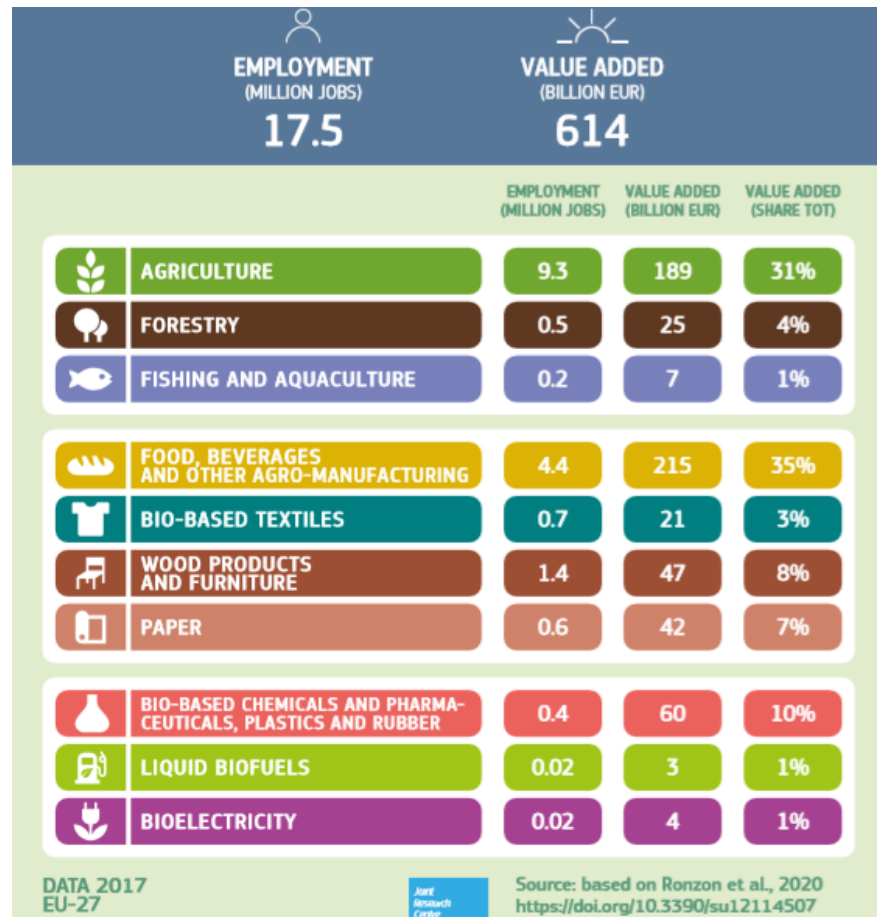
The main use of biomass is for food and feed; woody biomass is increasingly used.



Source: European Commission, Knowledge Centre on Bioeconomy, 2022

2017 data dry matter

Important innovations in food and other bio-based industries show the potential of the bioeconomy

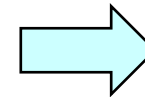


Bioeconomy as key sectors of the EU's economy

- ~8.9% of the EU's workforce
- ~75% employed in agriculture, food and drink industry
- 4.7% of GDP
- High job creation potential
- Potential for deployment of comprehensive bio-based solutions in rural, coastal and urban areas

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- Monitoring progress towards the EU Bioeconomy objectives
- Assessment of EU Green Deal initiatives in relation to bioeconomy sustainability objectives

Europe is generally moving towards the objectives of the EU Bioeconomy Strategy but environmental challenges persist



The Bioeconomy Monitoring Framework

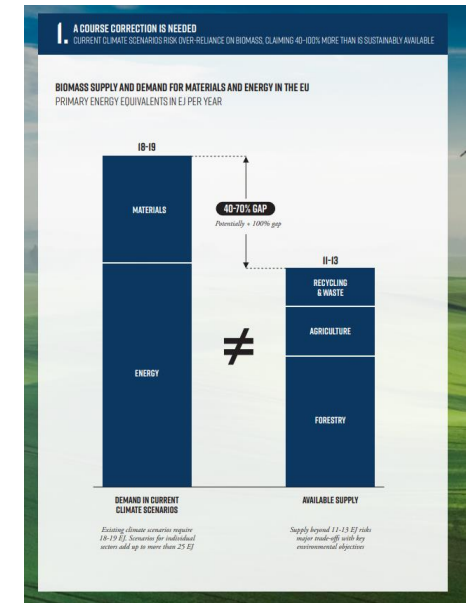
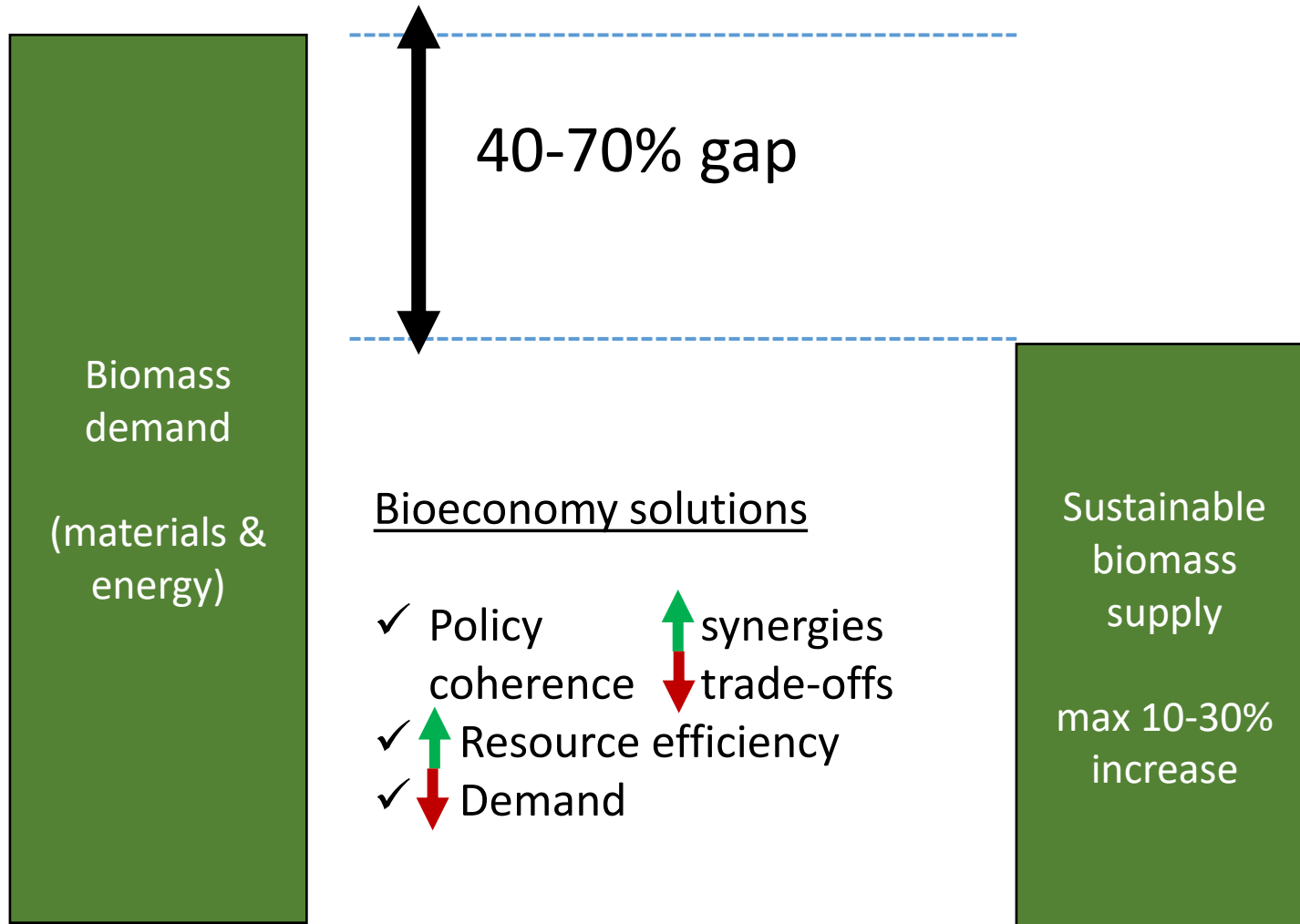
<https://publications.jrc.ec.europa.eu/repository/handle/JRC119056>

- Need more policy coordination to address the multiple pressures on land and material demand
- Need to transform and re-skill the work force

EU Green Deal Initiatives and the BE Strategy

		Ensuring Food and Nutrition Security	Managing Natural Resources Sustainably	Reducing dependence on non-renewable unsustainable resources, whether sourced domestically or from abroad	Mitigating and adapting to climate change	Strengthening European competitiveness and creating jobs	
Circular Economy	[1]						In focus
Industry Strategy	[2]						
Biodiversity Strategy	[3]						Contribution
Farm to Fork Strategy	[4]						
Renovation Wave	[5]						Requires attention
European Climate Law	[6]						
Chemicals Strategy for Sustainability	[7]						Requires attention
Adaptation Strategy	[8]						
Sustainable Financing	[9]						Requires attention
Zero Pollution Action Plan	[10]						
LULUCF	[11]						Requires attention
Renewable Energy	[12]						
Forest Strategy	[13]						Requires attention
Sustainable Carbon Cycles	[14]						

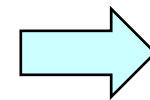
Supply, transformation and use of biomass



Material Economics. "EU Biomass Use in a Net-Zero Economy. A Course Correction for EU Biomass," 2021.
<https://materialeconomics.com/latest-updates/eu-biomass-use>.

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- Strengthen and scale up the bio-based sectors, unlock investments and markets
- Deploy local bioeconomies rapidly across the whole of Europe
- Understand the ecological boundaries of the bioeconomy

Overall implementation of the EU Bioeconomy Action Plan is well on track

- Strong progress on developing bio-based solutions through R&I and increasing public and private investments
- Improved cooperation with MS
- Better understanding of ecological limits, but remaining gaps

Industry in the Bioeconomy Progress Report

Strengthening of the bio-based sectors = one of the action areas

Public-Private Partnerships:

- EUR 835 million support from the EU to **Biobased Industries (BBI) JU** → attracted private investment of EUR 2.73 billion
- 1 billion EU contribution from Horizon Europe to the **new Circular Biobased Europe (CBE) Partnership** scale-up the EU bio-based industry

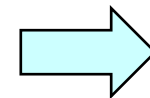


Further actions to strengthen the sector:

- **Further investments** (overcoming ‘the valley of death’), support for bioeconomy start-ups
- Creating a stronger ‘**policy pull**’
- **Better consumer awareness** of bio-based products – standards, labels, robust information on the environmental performance (follow-up through **carbon removal certification schemes**)

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Next steps

Additional focus needed

Focus on resolving multiple pressures on land and sea

Biosphere stewardship strategy

Integrated bioeconomy land use assessment

Territorial biomass strategies

Conceptual framework to resolve trade-offs

Additional focus needed

**Focus on the overall
consumption of biological
resources**

Consumption-based framework

Monitoring consumption footprint

**Demand driven shift to sustainable
consumption choices**

Sustainable and inclusive business models



Bioeconomy Conference

- High-level **Bioeconomy Conference** in Brussels to present the Progress Report on the EU Bioeconomy Strategy
- **6-7th October 2022**
- **Please save the date!**

Thank you



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MAIKE NIGGEMANN

Policy Adviser, IndustriAll Europe



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Unlocking a bioeconomy across Europe – The workers' perspective

industriAll European Trade Union

- European federation of trade unions representing manual and non-manual workers in the chemical, energy, mining, metal, paper, textile, clothing and footwear sectors and related industries and activities
- 7 million workers united within 180 national trade unions in 38 European countries

Progress in the Bioeconomy

- **Employment:** Increase? What kind of employment?
- **Just Transition:** *the transformation of the economy in a fair and inclusive manner to ensure the maintenance and creation of good quality jobs. The participation of workers and their trade unions in the anticipation and social management of industrial change is a prerequisite: ‘Nothing about us without us’* ([Just Transition Manifesto 2022](#))
 - ❖ Potentially good show case but more/detailed information needed
- **Skills:** Intelligence with a regional component

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Bridging the gap



Making the transition





BERNARD DE GALEMBERT

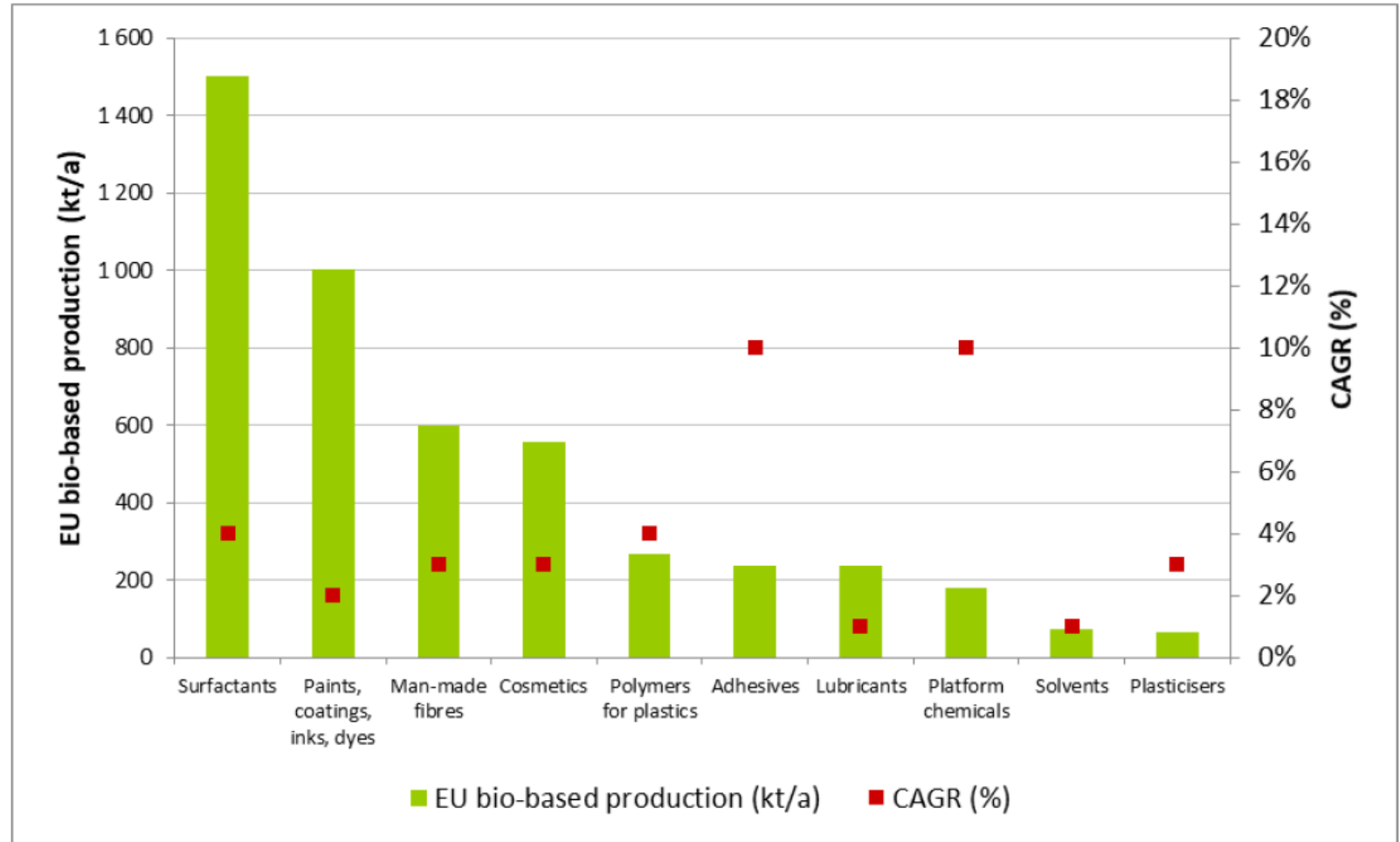
Sector Group Manager
Cefic



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The bioeconomy strategy: an impetus for bio-based chemicals?

- 2019 turnover (excl. Biofuels): 40 bn € (7.5% EU chemical industry turnover)
- A success story for our industry:
 - Research and innovation fundings (CBE JU, Horizon Europe)
 - Investment support (ECBF)
 - Knowledge base (JRC)
- Potential for growth



SWD Figure 4. EU bio-based chemical production by chemical category in 2018 and associated expected annual growth rate by 2025.

Source: JRC (2021). <https://publications.jrc.ec.europa.eu/repository/handle/JRC112989>



Hints for a faster development: aligning the stars

- ★ Policy consistency: carbon cycles, circular economy action plan (PPWD, Biobased plastics, Textile strategy ...), Fit for 55 (RED, LULUCF) ...
 - ★ Supportive assessment and recognition of the benefits of the bioeconomy (e.g. PEF)
 - ★ Available and accessible domestic biomass
 - ★ Enhanced market access and competitiveness
 - ★ Innovation-friendly ecosystem (beyond fundings)
 - ★ Awareness (e.g. data granularity, campaigns ...)



Thank you for your attention

For more information, please contact
publicaffairs@cefic.be



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